

# PETITION

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Your Petitioners, James D. Miralles, Rebecca S. Miralles and Shelly Osentowski, citizens of the United States of America and residents of the State of Nebraska, whose residence and mailing address for James D. Miralles is 14530 Charles Street, Omaha, Nebraska 68154, for Rebecca S. Miralles is 14530 Charles Street, Omaha, Nebraska 68154 and for Shelly Osentowski is 1109 Howard Street, Apt. 405, Omaha, Nebraska 68102, pray that Letters Patent Protection be granted to them for an

## **ADVERTISING AND FUNDRAISING SYSTEM AND METHOD**

as set forth in the following specification:

### **Cross-Reference to Related Provisional Application**

This application claims priority to the filing date of related provisional patent application serial No. 60/461,096 filed on April 8, 2003.

### **Background of the Invention**

#### **1. Technical Field**

The present invention relates to advertising and fundraising methods and, more particularly, to an advertising and fundraising system and method in which a plurality of separate business entities provide marketing materials which are combined onto a single piece of electronic media, the marketing materials including coupons and discounts applicable to the separate business entities, the packaged electronic media being distributed through various marketing channels to consumers who then may access the advertising

1 information contained on the electronic media to patronize the  
2 business entity while displaying the electronic media as indicia  
3 for redeeming the coupon or discount.  
4

## 5 **2. Description of the Prior Art**

6 With the proliferation of not-for-profit organizations such as  
7 charities, hospitals and schools, there has been an equal growth in  
8 the amount of fundraising which must be done to permit these  
9 organizations to continue functioning. Fundraising doesn't stop  
10 with not-for-profit organizations, however, as numerous  
11 organizations and foundations all need to raise funds to continue  
12 their operations. There are, of course, thousands of different  
13 types of fundraising vehicles which can be used by these  
14 organizations, and particular fundraising vehicles may be  
15 particularly suited for use with certain organizations. However,  
16 one type of fundraising vehicle which has been found to be  
17 particularly successful is the coupon book which has been in use  
18 for many years.

19 In general, the coupon book fundraising program would involve  
20 contacting a group of merchants who each agree to supply a  
21 discounted service or discounted good in exchange for being entered  
22 in the advertising coupon book. The coupon books are then  
23 distributed to purchasers at a set price which produces a profit  
24 margin for the fundraiser. The purchaser of the coupon book then  
25 may redeem the coupon for the discounted good or service with the  
26 merchant, thus completing the transaction. While this type of  
27 fundraising system is fairly good at connecting the merchants with  
28 the customers, it is also limited in that the advertising which the

1 merchant may provide to the purchaser is restricted to print  
2 advertising only and therefore the advertising message from the  
3 merchant is limited in appeal. Furthermore, due to the  
4 inconvenient size and weight of the coupon book, it is often  
5 difficult for the purchaser of the coupon book to gain full use of  
6 the coupon book as they must carry the coupon book with them where  
7 ever they visit in order to use the coupon books with the various  
8 merchants. There is therefore a need for an easy to use and  
9 convenient fundraising system which is easily redeemable by the  
10 merchants yet is easily carried by the purchasers.

11 An attempt to solve this problem has been made by several  
12 companies in that they supply a credit card-like card for the  
13 purchaser to carry with them, the card operating such that when it  
14 is shown at the merchant, the merchant will redeem the coupon which  
15 has been purchased by the purchaser. Although this credit card-  
16 like card does alleviate some of the problems encountered with the  
17 fund raising systems of the prior art, it does not solve in any way  
18 the issue of the advertising which the merchant is able to use in  
19 connection with the fund raising program. There is still therefore  
20 a need for an easily used fundraising system which permits the  
21 merchant to advertise their goods or services in the most appealing  
22 and effective manner possible.

23 Therefore, an object of the present invention is to provide an  
24 improved advertising and fundraising system and method.

25 Another object of the present invention is to provide an  
26 advertising and fundraising system and method which incorporates  
27 advertising electronic media such as a credit card CD-ROM which may  
28 be accessed by the purchaser and will include enhanced visuals and

1 graphics to provide high-quality advertising for the merchants  
2 connected with the card.

3 Another object of the present invention is to provide an  
4 advertising and fundraising system and method in which a plurality  
5 of merchants may be advertised simultaneously on the credit card  
6 CD-ROM in order to provide effective and efficient advertising for  
7 the merchants connected with the fundraising method.

8 Another object of the present invention is to provide an  
9 advertising and fundraising system and method in which distribution  
10 of coupon books is eliminated, thus greatly increasing the  
11 efficiency of the fundraising system.

12 Finally, an object of the present invention is to provide an  
13 advertising and fundraising system and method which is relatively  
14 inexpensive to introduce and safe, efficient and effective in use.

## 1   **Summary of the Invention**

2       The present invention provides a system and method for  
3 fundraising and marketing including the steps of contacting at  
4 least one merchant/vendor to obtain merchandise and service  
5 discounts and offers and receiving advertising content containing  
6 the merchandise and service discounts and offers from the  
7 merchant/vendor. The advertising content received from the  
8 merchant/vendor is then converted and organized into electronic  
9 format advertising, and the electronic format advertising is then  
10 transferred and stored on portable electronic format advertising  
11 storage media such as a credit card CD-ROM. The portable  
12 electronic format advertising storage media is then provided to  
13 fundraisers and the fundraisers then distribute the portable  
14 electronic format advertising storage media to purchasers whereby  
15 funds are raised. The purchasers then may view the electronic  
16 format advertising on the portable electronic format advertising  
17 storage media via a computer system to obtain information on the  
18 merchandise and service discounts and offers. Finally, the  
19 merchandise and service discounts and offers are redeemed by the  
20 purchasers with the merchant/vendors via display of the portable  
21 electronic format advertising storage media to the merchant/vendors  
22 by the purchasers whereby the purchasers receive at least one of  
23 the merchandise and service discounts and offers.

24       It is thus seen that the present invention provides a  
25 substantial improvement over those fundraising systems and methods  
26 found in the prior art. For example, merchants who advertise using  
27 the present invention may include far more information and  
28 interest-generating advertising copy with their advertisements than

1 that permitted in connection with prior types of fundraising  
2 systems and methods. Also, because the credit card CD-ROM of the  
3 present invention is compact and easy to carry, the purchasers of  
4 the fundraising system of the present invention may easily use the  
5 card without requiring the carrying of large and inconvenient  
6 coupon books. Finally, because the credit card CD-ROM of the  
7 present invention is capable of holding large quantities of  
8 information, a far greater number of merchants may be incorporated  
9 into the fundraising system which will thus greatly increase the  
10 profit margin which is obtainable by use of the fundraising system  
11 of the present invention. The present invention thus provides a  
12 significant improvement over those fundraising systems and methods  
13 found in the prior art.

1 **Brief Description of the Drawings**

2       Figure 1 is a high-level flow chart illustrating the method of  
3 the present invention; and

4       Figure 2 is a more detailed flow diagram illustrating the  
5 method of the present invention.

## **Description of the Preferred Embodiment**

The advertising and fundraising system and method of the present invention is shown best in Figures 1 and 2 as including the following steps. Initially, a number of business entities would be contacted to be included on the advertising electronic media to be distributed. Each of the business entities or merchants would be entitled to include at least one ad in the electronic media, the ad to include a discount coupon or price reduction which can be redeemed by the purchaser of the electronic media. The discount or special offer may be of virtually any type, including but not limited to the following: buy one get one free, a weekly special, a percentage reduction off of the total bill, a free appetizer, or any other such discount or special offer. Also, the advertising may be of any appropriate type, including advertising copy, a reproduction of the menu, a graphic depiction of the business or business location, a map to facilitate finding of the business, and virtually any other commonly used print media advertising device to encourage redemption of the coupon or attendance at the business entity location.

Once each of the merchants has been lined up to advertise on the electronic media and have determined their various special offers and/or discount coupons to be included, all of the information is transferred to an electronic media for distribution thereof. In the preferred embodiment, the electronic media used would be a credit card-shaped CD-ROM which stores the advertising information from the merchants in an accessible electronic format thereon. The face of the credit card CD-ROM includes specific information pertaining to the campaign or fundraising event with



1 which the credit card CD-ROM is associated. Other information such  
2 as the manufacturer of the credit card CD-ROM or the owner of the  
3 method rights may also be printed on the face of the credit card  
4 CD-ROM, depending upon the desires of the user of the invention.

5       Once all of the information regarding the merchants has been  
6 burned onto the credit card CD-ROM, the credit card CD-ROM is  
7 duplicated and prepared for distribution. In its intended use, the  
8 credit card CD-ROM serves as a fundraising vehicle for schools,  
9 non-profit organizations, corporations, or individual merchants who  
10 will charge consumers a certain price to purchase the credit card  
11 CD-ROM, thus permitting the consumer to access and use the various  
12 coupons and special discounts offered by the merchants on the  
13 credit card CD-ROM. Once the consumer has purchased the credit  
14 card CD-ROM, he or she may then insert the credit card CD-ROM into  
15 any available computer equipped with a CD-ROM reader and access the  
16 information contained thereon. The card would be placed in the CD  
17 drive of the computer and, in the preferred embodiment, the list of  
18 merchants would be presented in an automatic launch presentation.  
19 The directory of merchants would be made available to the consumer  
20 in order to permit the consumer to "page through" the various pages  
21 of advertising being presented until he or she has reached the  
22 desired ad to determine the discount being offered by the merchant.  
23 A significant improvement over the prior art is that the consumer  
24 may interact with the credit card CD-ROM to run searches or to view  
25 merchants page by page should the consumer desire to do so.

26       Finally, although it is an element of the present invention  
27 that the consumer may print out coupons from the credit card CD-  
28 ROM, it is preferred that the credit card CD-ROM itself be used to

1 indicate to a merchant that purchase of the credit card CD-ROM has  
2 occurred, by displaying the credit card CD-ROM to the merchant,  
3 thus permitting the consumer to use the discount and/or special  
4 offer offered by the merchant without requiring printing of a  
5 coupon or the like. This is a key element of this invention in  
6 that the prior art methods invariably require accessing a  
7 particular page on the CD-ROM and obtaining access to a printer to  
8 print the coupon associated with the merchant. One must then make  
9 sure to bring the coupon to the merchant location in order to  
10 redeem the coupon, which means that the consumer must preplan his  
11 or her outing to go to the particular merchant for which the coupon  
12 is being printed. While there are many people who enjoy planning  
13 which restaurant they will attend, or specifying in advance which  
14 merchant location they will be visiting, there are just as many  
15 consumers who leave their households with a general plan of  
16 shopping and dining, without having specific destinations in mind.  
17 For these consumers, the accessing of information on a CD-ROM, the  
18 printing of particular coupons and the taking of those coupons with  
19 them does not serve their needs. Instead, it is only the present  
20 invention which satisfies those needs in a novel and unique way.

21 Specifically, the consumer would merely present the credit  
22 card CD-ROM to the merchant at the merchants location to obtain the  
23 discount or special offer which has been offered by the merchant on  
24 the credit card CD-ROM. Therefore, the credit card CD-ROM serves  
25 as indicia of the purchase of the discount coupons, and thus the  
26 merchant will redeem the proffered credit card CD-ROM for the  
27 particular discount or special offer being offered by the merchant.  
28 The ease and simplicity by which the present invention permits

1 redemption of discounts and special offers is unprecedented and  
2 therefore is believed to be deserving of protection.

3        Numerous benefits of the present invention are conferred on  
4 both consumers and merchants who utilize the present invention, not  
5 to mention the fundraising organization which connects the  
6 merchants to consumers. For example, the credit card CD-ROM of the  
7 present invention is very user friendly and permits the consumer to  
8 easily carry the indicia permitting redemption of discounts and/or  
9 special offers in his or her wallet, purse or pocket. For  
10 merchants, the advertising method is extremely cost-effective and  
11 encourages patronizing of the merchant's location which will likely  
12 lead to more and further sales. Also, the relatively small size  
13 and weight of the credit card CD-ROM makes handling and  
14 distribution of the credit card CD-ROMs much easier than that  
15 offered by those fundraising methods found in the prior art. For  
16 example, redeemable coupon books have been around for years and are  
17 still used for fundraising purposes to this day. However, schools  
18 and non-profit organizations which utilize the coupon books for  
19 fundraising voice universal complaints regarding the unwieldy  
20 nature of the coupon books, which take up great amounts of space  
21 during storage of the coupon books and, due to the relatively heavy  
22 weight of the coupon books, are somewhat difficult to distribute to  
23 consumers. The present invention provides a novel and simple  
24 solution to those problems presented in the prior art which have  
25 not been solved to date. Also, the small size of the credit card  
26 CD-ROM permits for easy recycling of the credit card CD-ROM once  
27 the end of the fundraising campaign is reached. This makes the  
28 present invention very environmentally friendly and encourages

1 recycling, also an improvement over the prior art.

2 Another important feature of the present invention is that  
3 usage of the credit card CD-ROM can be electronically tracked by  
4 the fundraiser, the merchant/vendor and/or the maker of the CD-ROM  
5 to obtain information which can be used for future fundraising  
6 ventures, in addition to answering the fundraiser's question as to  
7 the effectiveness of the campaign. Some of the information which  
8 can be tracked includes page hits in the use of the credit card CD-  
9 ROM, the number and percentages of redemptions with vendors, the  
10 number and nature of redemption requests, emails sent and received  
11 and the number of referrals to other vendors and merchants, all of  
12 which can be used to focus the fundraising system for future  
13 fundraising events.

14 Finally, a very important feature of the present invention is  
15 that the fundraising entity can be properly branded. With many of  
16 the fundraising systems of the prior art, the fundraising entity is  
17 very limited in the manner in which they may inform purchasers of  
18 the coupon book or the like of their identity. In fact, many of  
19 the prior art systems only permit the fundraising entity to attach  
20 a sticker or small, brief description to the fundraising device.  
21 Compare this to the present invention in which the fundraising  
22 entity may fully inform the purchaser of the credit card CD-ROM of  
23 their beliefs and creeds thus further encouraging the purchaser to  
24 continue their support of the fundraising entity. The present  
25 invention thus provides numerous features which are not found in  
26 the prior art and which render the present invention superior in  
27 many respects to those systems found in the prior art.

28 It is to be noted that numerous additions, modifications, and

1 substitutions may be made to the present invention which fall  
2 within the intended broad scope of the above description. For  
3 example, the merchants and/or business entities included on the  
4 credit card CD-ROM may be varied according to the intentions of the  
5 user of the present invention. Furthermore, the precise nature of  
6 the electronic media used for storage of the advertising materials  
7 is critical only in that the electronic media must be compact and  
8 easily handled and lend itself to being portable so that the  
9 consumer may easily show the electronic media to the merchant, thus  
10 providing indicia of purchase of the discount and/or special offer.  
11 Also, the precise method by which the information on the electronic  
12 media is displayed on the computer is not critical to the present  
13 invention so long as the consumer may access the information to  
14 obtain information on the merchants included on the electronic  
15 media and their various discounts and/or special offers being  
16 offered. Finally, the specific details on obtaining merchants for  
17 inclusion on the electronic media and sale and distribution to the  
18 consumer are not critical and would be understood by one skilled in  
19 the art of fundraising and/or marketing.

20       There has therefore been shown and described an advertising  
21 and fundraising system and method which accomplishes at least all  
22 of its intended objectives.